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ABSTRACT

Based on the oral and written discussions of a workshop conference on the consultative process, this pamphlet identifies salient features for major considerations in using and being a consultant. In regard to using a consultant, guidelines are presented for--(1) identifying the purpose, (2) selecting the consultant, (3) appointing the consultant, (4) preparing for the consultant's visit, (5) receiving and working with the consultant, and (6) following up on the consultant's visit. In regard to being a consultant, guidelines are presented for--(1) accepting an appointment, (2) preparing for consultation, (3) on the job, and (4) follow-up consultation. Information is included on budgets, evaluation, and compensation services. (FS)

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ON USING AND BEING A CONSULTANT

EF003950

American Association of Junior Colleges

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Foreword

This publication on consultative services is the result of a conference held in the fall of 1966 at Airlie House Conference Center in Warrenton, Virginia. The conference was sponsored by the American Association of Junior Colleges and was supported by a grant to the Association from the Pren-Hall Foundation.

Although the conference membership represented the allied health and medical education areas, it was soon decided that the discussions of the conference concerning using and being a consultant should focus upon guidelines for consultative services generally, without special emphasis directed to any particular cluster of disciplines. These guidelines then could be used as basic material for consulting services in any field. It seemed to the conference leadership that the selection of persons competent and experienced in the development of health and medical education programs on the junior college level was appropriate, since many of these programs are among the more mature of the community junior college's occupational education programs.

The American Association of Junior Colleges gratefully acknowledges the cooperation and help of all those who supported the conference, served on the planning committee, and participated in the program. Appreciation is expressed to the Pren-Hall Foundation for its interest in the program and for its support through a generous grant for the conference, and to Howard Warrington, Albert Belskie, and John Riina of Prentice-Hall publishing company whose recommendations and participation were invaluable to the success of the conference. Appreciation and acknowledgment are also expressed to Edmund J. Gleazer, Jr., Robert Kinsinger, Norman Harris, Mildred Montag, and Kermit Morrissey for their outstanding leadership. Much of the material for the publication came from their papers and addresses at the conference.

Muriel Ratner, a conference participant, accepted the difficult responsibility of preparing the manuscript for the publication, and the Association is grateful for her fine work.

Staff of the Association's Occupational Education Project served as conference coordinators and discussion group leaders.

K. G. Skaggs
Conference Coordinator

Introduction: A Workshop Conference

The Need

Two-year colleges are instituting new technical curriculums, and expanding existing ones at a rapid rate. Often the development of these programs is so complex and esoteric that colleges must rely upon the services of experts.

Few colleges can maintain a full staff of specialists in all fields. As a result, most of them have occasion to call upon outside consultants to help in developing new programs.

The *sine qua non* of good consulting services is the availability of knowledgeable and experienced consultants, but this alone is not enough. It is important to know when and why a consultant is needed; how to select and use a consultant; and what to do before, during, and after the consultant is engaged.

The experts, in turn, must be fully aware of their obligations and specific role in the consultative process.

The need to identify and clarify the major elements and responsibilities in this process led to the organization of a workshop on consultation for program development.

The Conference: Place and Purpose

In fall 1966, a Pren-Hall Foundation grant to the American Association of Junior Colleges enabled the Association to organize a workshop to identify the salient features in the consultative process, and develop a set of guidelines on using and being a consultant.

Forty-seven educators and leaders in the health-related professions* met at Airlie House, Warrenton, Virginia, for four days of intensive study and discussion.

The Conference: Method

From the outset the climate of the conference was relaxed and informal. The environment in which the conference was set led to a free exchange of ideas and opinions.

The framework for the discussions was established with the presentation of two kinds of position papers—one on the college using a consultant for program development, and the other on the consultant's serving the college. At the conclusion of the presentations, the group divided into three smaller sections for further discussion and exchange of views. These discussions were followed by sessions at which all participants were invited to write as much as they cared to say about the subjects discussed. A final analysis of all written work revealed a remarkable consensus on: (a) the general framework for consultation in the area of program development; and (b) the consultees' and consultants' responsibilities for setting the conditions to facilitate the consulting task.

The work which follows is a composite summary of the oral and written discussions. The guidelines are but an outline of the major considerations in the consulting process. By no means is it a definitive statement on the subject, since the uses and purposes of consulting range through the length, depth, and breadth of human endeavor. The final results and recommendations have relevance for all technical fields.

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* *See Foreword*

The conference participants, whose names appear in the appendix, hope that their deliberations will lighten the tasks of all who engage in consulting activities.

The Conference: Keynote

The workshop was keynoted by a general discussion in response to the question, "Why are consultants used?"

Consultants may be employed for a wide variety of purposes and reasons, but in terms of the primary objective of the conference at Airlie House—program development—the participants in the workshop cited the following conditions as major reasons for requiring outside consultative assistance:

Specialized knowledge and skills: When facts or information concerning a highly sophisticated and technical field are not known to members of the staff, a college may seek the assistance of a specialist to help in planning feasibility surveys, or planning and developing a new curriculum or program.

Time and manpower savings: Problems are known to have been faced and successfully resolved elsewhere; hence a consultant may be brought in to point out the ways to resolve a similar task expeditiously. In addition, the need to organize a new program, or modify existing programs may not permit the expenditure of endless time and manpower to get at the solutions to the problems. Even when qualified college personnel is available, its time schedules and other responsibilities may keep it from adequately attending to the details of a new task.

Objectivity and a fresh viewpoint: Another reason for seeking outside assistance is the need to obtain the viewpoint of an outsider. The facts are available, the problem stands out in bold relief, several solutions to it are apparent; but agreement cannot be reached on a solution acceptable to all concerned. An outside consultant, presumably free of bias, may be brought in to introduce a fresh approach which had not previously been considered.

Extension of resources: An outside consultant, by virtue of his position, may have more resources than local talents. Often what is needed is not assistance in solving issues relating to program development but knowledge and suggestions on where to find money, personnel, facilities, or materials with which to begin the development of a new program.

On Using A Consultant

Identifying the Purpose

Even for the specific purpose of program development or improvement, consultants differ greatly in experience and specializations. Some provide only a single specialized or auxiliary service (e.g. laboratory equipment needs, specifications for an x-ray technology program, curriculum pattern for a nursing program, surveys for the development of business or engineering technology programs, etc.). Others are prepared to offer a wider range of expertise. The workshop conferees, therefore, agreed that prior to selecting a consultant, the college should very clearly define the purpose a consultant is to serve. Moreover, all who are concerned with the problem should be in agreement regarding the purpose of the consultant.

The agreed-upon definition of purpose should be written down to ensure that it is clear to all concerned.

Selecting the Consultant

Having defined and agreed upon the consultant's purpose, the next step is to identify one who is qualified to achieve the purpose. Finding the person best qualified

for a given assignment is an essential factor in resolving the problem. For program development in curriculum fields firmly established in two-year colleges, such as business and engineering, a selection of qualified consultants may be more readily available than for fields in which two-year college programs are being developed. The health technologies are characteristic of this latter group.

SOME CAREERS OFFERED IN THE TWO-YEAR COLLEGE

- Data processing technician
- X-ray technician
- Environmental health technician
- Civil engineering technician
- Dental hygienist
- Chemical laboratory technician
- Hotel, motel, restaurant mid-level personnel
- Sanitation engineering technician
- Occupational therapy assistant
- Dental assisting technician
- Mid-level retail manager
- Ophthalmic dispenser
- Nurse
- Medical record technician
- Surgery technician
- Unit ward manager for hospitals
- Biomedical engineering technician
- Police administration and police science personnel

The results of recent studies have indicated that a wide variety of health related careers can be developed as technical level offerings in two year colleges. Indeed, the Allied Health Professions Personnel Training Act of 1966 (P.O. 89-751) has encouraged the development of such programs. With the exception of nursing and

some dental auxiliaries, health technology curriculum consultants for two-year programs are not readily available. Another broad field, where a scarcity of qualified consultants may exist, is that of public and community services. As new technical programs emerge in other broad fields, similar difficulties may prevail.

A consultant can be secured through one of several sources:

Professional Associations: Many professional associations offer consultation as part of their membership services. If they do not, they frequently maintain a directory or roster of names of persons who can serve as consultants.

Other Colleges: Colleges where similar projects have been undertaken can frequently recommend a source of consultants.

State Education Departments: New programs and curriculums are frequently required to be approved by a legally constituted body, such as a state department of education, or a state university. Such organizations may have field specialists on the staff, or they may maintain a roster of specialists upon whom they call as particular needs arise.

American Association of Junior Colleges: The Association maintains a staff of occupational consultants who, if they cannot themselves serve the specific purpose, can frequently recommend appropriately qualified personnel.

Personal Inquiry: If all else fails, an effective means of finding the right person is to "ask around."

Advisory Committees: One of the services that an advisory committee in any disciplinary area can offer the junior college is to recommend knowledgeable and competent people from the profession as consultants.

PROFESSIONAL ORGANIZATIONS OFFERING CONSULTING SERVICES

American Medical Association, Council on Education
American Society for Engineering Education
National League for Nursing
Commission on Undergraduate Programs in Mathematics
American Dental Association, Council on Dental Education
Association of Colleges and Secondary Schools
American Library Association
American Hospital Association
International Association of Chiefs of Police
Association of Operating Room Nurses
National Council on Medical Technology Education
National Health Council
American Society of Civil Engineers
American Association of Junior Colleges
American Occupational Therapist Association
American Association of Medical Record Librarians
American Association of Inhalation Therapy

The college's ultimate choice of a consultant is contingent upon the particular function he is expected to serve. Since consultants generally do not think of themselves in terms of "time-manpower savers," or "firefighters," it is incumbent upon the consultant-seeker to carefully determine the function which the consultant is to serve.

DO YOU WANT YOUR CONSULTANT TO SERVE AS YOUR—

ADVISOR—to counsel you in time of need?

ARBITRATOR—to mediate differences of opinion between opposing factions?

DECORATOR—to enhance the image and prestige of your institution?

DISPENSER—to provide specialized information and expertise?

EVALUATOR—to assess the strengths and weaknesses of your institution?

FIRE FIGHTER—to resolve a problem or settle a crisis with great dispatch because no alternative is available?

INNOVATOR—to introduce new ideas, concepts, methodologies, or approaches?

When a list of suitable consultant candidates has been compiled, the college should investigate the qualifications of those suggested. If possible, references should be obtained from colleges where consultants have served before.

It is difficult to suggest criteria by which potential consultants' qualifications may be judged, since the nature of the colleges' consultative purposes and their general contexts may differ widely. Perhaps the most useful investigation of qualifications would be obtained through brief preliminary discussions with the tentatively selected consultants themselves. Whether the evaluation is determined through such discussions with the consultant candidates or through references from other agencies, the relevancy of qualifications sought should center about the particular purpose to be served.

DESIRABLE PERSONAL CHARACTERISTICS OF CONSULTANTS

OBJECTIVITY—approaches problems without preconceived ideas as to their solution.
INDEPENDENCE—is not influenced by status of personnel or by vehement objections to suggestions, has courage of his convictions.
INTEGRITY—respects confidences.
PATIENCE—works patiently on assignments which call for long hours of discussion, or which require attention to masses of detail.
TACT—has ability to deal with people gently but firmly.
RAPPORT—maintains harmonious relations with college personnel.

Appointing the Consultant

Following the selection of the consultant whose qualifications appear appropriate for the purpose to be served, the college should then write a letter of invitation and appointment. The letter should:

1. State specifically the purpose of the assignment.
2. State the conditions of his engagement: time to be spent, place, date, reports, remuneration, etc.

SAMPLE LETTER OF INVITATION

Mr. John Smith, Dean
Cross Creek Community Junior College
Midvale, Some State

Dear Dean Smith:

Erehwon Junior College is studying the development of occupational education programs. Our attention is directed at this time to the need locally for ancillary and semiprofessional personnel in the health and medical fields. Because of your experience and work in developing such programs, you have been recommended to this college by _____ as a person who could consult with us and help us in our studies.

I am inviting you to serve as a special consultant to this college for the further study and development of the programs mentioned above. Specifically, the purposes of your consulting visit would be:

1. To advise the college whether you believe the findings of the surveys made have been interpreted by us correctly and whether our assumptions based upon our interpretation are sound

2. To outline for us the appropriate next steps in procedure and to aid our committees in organizing their work

3. To review our proposed budget and to advise us whether or not we can financially support adequate and satisfactory programs

4. To meet with faculty, advisory committees, our board, and student groups; and to discuss with them programs that have been developed in other colleges; to give them an overview of manpower needs in the field and current activities on the national level; and to identify major problems or frustrations to satisfactory program implementation that we must overcome

5. To examine our available facilities and advise us of their adequacy and need for improvement, alteration, or construction.

We are suggesting to you a working schedule of five days, three in the initial visit and two to be arranged about six months later for follow-up and evaluation of our efforts and activities. For the first visit, we would suggest the first week in February, the days to be named by you. Our college will pay total expenses incurred in making your visit and a fee of $_____ per day {or a fee for the total assignment}.

We hope very much that you will be able to accept our invitation. Upon receiving a favorable reply from you, we will send you materials and surveys prepared by our staff. Travel and hotel arrangements will be made for you here.

Yours very truly,

Preparing for the Consultant's Visit

Participants in the workshop believed that this phase involved three kinds of preparation: preparation of the consultant, preparation of staff at the college, and preparation of a schedule for the consultant's visit.

1. Keeping the purpose of the consultation in mind, send to the consultant carefully selected and pertinent materials that will be helpful to him in preparing for the visit. If tangible items are not available, the consultant should be so informed. Again, the purpose of the visit will determine the kinds of background information the consultant should have.

2. Make certain that staff and personnel concerned with the visit are apprised that the consultant has been selected.

RESPONSIBILITIES TO THE CONSULTANT

Before visit, arrange for:

- suitable hotel accommodations
- convenient transportation
- meals
- appropriate welcome

During visit, provide:

- adequate conference space
- office supplies
- secretarial or clerical help
- guide or escort
- faculty schedules
- directory to particular facilities and offices
- adequate time for introductions to faculty and administrative personnel
- concerned with visit
- additional information
- list of advisory board members, with freedom to contact them

In general:

- avoid excessive socializing or commitment to social obligations which may lead to bias
- allow consultant time to reflect on visit and prepare preliminary report
- check with consultant periodically to ascertain specific needs or requests
- do not leave consultant "hanging" at end of day —make necessary arrangements for evening
- reaffirm following day's schedule
- provide for intracollege communication

3. Confer with staff members concerned with the consultant's visit and plan a schedule (allowing sufficient time for each step, conference, or interview). Again, the nature of the consultation will determine the extent of preparation required. If facilities and activities are to be observed or evaluated, the schedule should make allowances for this as well as for discussions.

The schedule should allow for flexibility to make possible revisions, if need be.

Receiving and Working with the Consultant

Depending upon the nature of the consulting task, all who are concerned should be prepared to meet the consultant to review the purpose and planned schedule for the visit. If known at this time, the consultant should be informed of the kind of report or presentation expected of him at the conclusion of his undertaking. In addition to knowing what is expected of him, it would not be amiss to discuss and clarify what is not expected of him. Such an understanding would safeguard against the college expanding the limits of the agreed-upon assignment, and will ensure that the consultant will not overstep the bounds of his assignment or infringe upon work to be done by others.

Facilities and secretarial or clerical assistance should be put at the consultant's disposal, particularly if a report is expected of him before he concludes his visit. In any event, opportunity—time and space—should be provided the consultant to summarize the events of the visit.

At the conclusion of the visit, plan a conference with the consultant and key individuals to discuss findings and recommendations.

Consultant

- All information relating to the college obtained in the course of professional activities shall be treated confidentially.
- A consultant will not accept the engagement unless he has reason to believe tangible results can be obtained for the college.
- A consultant will not, at the same time serve two or more institutions seeking the same information.
- A consultant will endeavor to accomplish the work expeditiously, consistent with professional thoroughness, and without disrupting the daily operations of the college.
- A consultant will acquaint the college with the principles, methods and techniques used, so that resultant suggestions and recommendations may be properly managed and continued after completion of the consultative undertaking.

Consultant and College

- The predetermined fee for this service shall not be contingent upon the results of the work.
- In arranging for consulting services, all reasonable steps shall be taken by the consultant and the college to ensure a mutual and clear understanding of the scope and objectives of the work before it is commenced.
- The consultant and college personnel shall discuss in detail any important changes in the nature, scope, timing, or other aspects of the service, and shall obtain mutual understanding and agreement before new action is undertaken.

Following Up on the Consultant's Visit

The engagement of a consultant for any purpose represents an expenditure of time, energy, and money. Once the consultant has concluded his task, it is the

college's responsibility to follow through. Those responsible should systematically consider the recommendations, suggestions, or evaluations the consultant has offered, and, when appropriate, follow them.

The decision to accept, either in whole or in part, the results that emerge from the consultant's visit is the college's responsibility, not the consultant's. The college may choose to entirely reject the consultant's recommendations, but this, too, is exclusively the college's responsibility.

After a decision on some course of action has been made, the college may request the consultant's assistance in carrying out its implementation. Consider first, however, if this was part of the original request for consultation service. If not, it constitutes an additional assignment which should be negotiated separately. The conference participants were particularly concerned with this aspect of the consultative process. For this reason, the importance of a clearly defined purpose is reiterated.

If an agreement had been made to remunerate the consultant and to reimburse him for expenses incurred, follow through at an early date subsequent to the completion of his service.

On Being A Consultant

Accepting an Appointment

While the college has the prime responsibility for defining the purpose for which it seeks a qualified specialist, the consultant has the prime responsibility in determining if his is the expertise the college requires Accordingly, when he is invited to serve as a consultant, he should carefully and quickly assess the nature of the request in terms of two major criteria *before* accepting the assignment.

1. Will his background and experience enable him to effectively fulfill the college's needs?
2. Does his schedule permit him to devote sufficient time and attention to the requirements of the assignment, i.e. preliminary preparation, travel, report writing, etc.?

These questions are, in a sense, ethical considerations. Should the answer to either one be negative, the responsible consultant would eliminate himself as a choice.

Preparing for the Consultation

Having reached a decision that the assignment meets the above criteria, the consultant should then proceed to the next steps.

1. Arrange and confirm (in writing) satisfactory conditions of the engagement: time to be spent, place, date. report, remuneration, etc.

2. If the college has not taken the initiative to offer them, secure and study pertinent materials and information relating to the consultative request.

3. Engage in such substantive study or research as may seem appropriate after getting acquainted with the purpose of, and plans for, the consultation.

On the Job

Upon arriving at the site where the major consultative activities will take place, the consultant must be aware that he is not working with an institution, but with people. During the workshop conference, one participant, speaking as a faculty member, asserted: "We at the college know more about the situation, about the problem, and—in all likelihood—about its resolution than the consultant." The consultant cannot anticipate that such an attitude will or will not prevail among the personnel he will be meeting. He should, however, be sensitive enough to realize that it can happen, that he will not be universally received as an infallible guide.

On the other hand, the consultant should also be aware that some with whom he will be in contact will welcome the chance to air some of their pet peeves, ideas, or frustrations. Therefore, the consultant should arrive at the consulting site fully prepared to meet individuals whose behavior and attitudes can, and often do, affect the proceedings which ensue.

The consultant should arrive promptly. A brief review of the purpose of the visit at this time will serve to focus

everyone's attention on the coming task. Prior knowledge of the schedule for the visit would be helpful to the consultant in planning his own course of action during the consultation. However, if this has not been available before his arrival, the consultant should ask for the schedule and suggest changes if, in his judgment, these would facilitate his assignment.

One function of the consultant is to gather the information and data that he will need as a basis for analyzing the problem or situation he was asked to study. Part of this information may have been supplied in the form of materials he received prior to his visit. A second major source of information will be the personnel he meets at the college.

Another of the consultant's responsibilities is to analyze the information in order to develop alternative solutions to the problem prior to preparing his report to the college. To the greatest possible extent, the consultant should utilize ideas and suggestions of the staff.

In the opinion of many workshop conferees, the consultant should prepare a preliminary draft of a report on his visit prior to leaving the consultation site. As a means of correcting factual errors or to confirm understandings, the consultant should confer with key staff members to exchange views and impressions of his findings.

Regardless of the purpose the consultant is asked to serve, several general do's and don'ts can be cited. While on the job, the consultant should:

1. Resist any temptation to divert time and efforts from the central purpose of the visit

2. Acknowledge lack of information regarding certain points, but suggest or offer to find a source for the information

3. Recognize that there may be hidden agenda in operation at the college, and seek to identify those that may be relevant to the purpose of the consulting assignment

4. Avoid any tendency to develop a "Jehovah complex," and also avoid the pat formulas and easy answers

5. Realize that his greatest contribution will probably be in getting effective participation at the local level

6. Consider the consultee's problems or proposals within the framework of his institution's social context. Although the college's problem may be quite similar to

another's, its solution or method of approach, by virtue of its particular setting, may differ markedly

7. Be highly professional in all that he does.

THE CONSULTANT'S APPROACH TO THE ASSIGNMENT

- Adheres to a code of professional and ethical behavior
- Is thorough and accurate in gathering facts and data relative to his assignment
- Does careful study and analysis of facts related to the problem
- Makes recommendations specific and conclusions concise
- Holds written report material to a realistic minimum—putting time into defining and solving problems
- Maintains neutrality in consultee's problem
- Uses time wisely and effectively

Follow-Up on Consultation

Depending upon the nature and purpose of the consultation assignment, the consultant may or may not have completed his responsibilities at the conclusion of his visit to the college. If a report was to have been part of his job by prior agreement, the consultant should prepare and complete it with dispatch. Promptness in submitting reports enables the college to plan and implement its next steps.

A Word About . . .

Budgets for Consultation Services

Colleges might want to consider establishing institution-wide use of consultants with appropriate provision for this in the college budget, including departmental and divisional budgets. This would serve to underscore the use of consultants as an on-going operation of the college—in short, preplanned continuing college development and improvement.

Evaluation of Consultation Services

Among the more controversial items discussed during the conference was the subject of evaluation of the consultant's service. The conference members seemed to be sharply divided on the suggestion that the consultant ask for an evaluation of his service as an aid to improving his work.

Some members thought that it was unlikely that the consultant's work would be criticized, and therefore it would be valueless to ask for an evaluation. Others believed that the consultant should somehow be informed of the consultee's reaction to his work and service.

In one sense, the subject of evaluation is an academic one, since an assumption can be made that the consultant was carefully selected *because* of his competency to serve in a particular capacity and for a well-defined purpose. How and what the college elects to do about his suggestions or recommendations is neither a measure nor reflection of the quality of the consultant's work.

In another sense, the subject of evaluation may be viewed as a matter of simple courtesy, since an assumption can be made that the consultant was interested in his assignment by having accepted it in the first place.

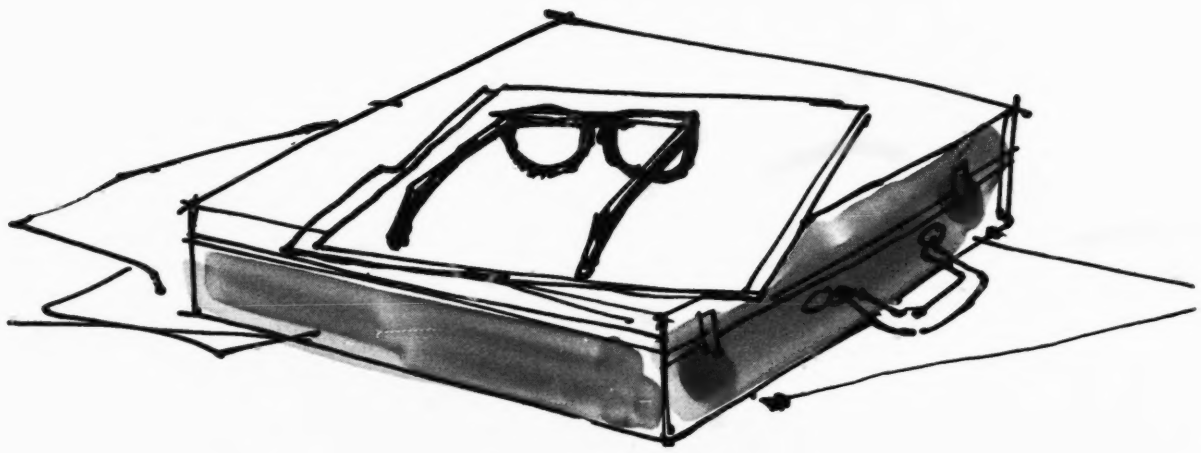
Information relating to why the college chose a particular course of action could serve as an aid in helping the consultant evaluate his experience for future assignments.

The matter of evaluation, it was concluded, should not be included within the body of the guidelines, but may be a peripheral consideration to be determined by prior mutual agreement between the consultant and consultee.

Compensation for Consultation Services

As earlier noted, state and other educational agencies frequently maintain staffs of specialists who function as consultants to colleges. As representatives of such agencies, they may serve the colleges without direct stipend. Some professional organizations, however, provide consultation as a professional service for which a fee has been established.

Many other specialists offer consultation as a personal service. Since this group often devotes personal time to consultative activities, it is not unusual that such effort is compensated by honorariums.



The nature of the particular assignment mitigates against the establishment of a fixed scale for honorariums, emoluments, stipends, remuneration, fees, or whatever one chooses to call them. In view of this, a comprehensive discourse on, or formula for, equitable recompense is not feasible.

It should be noted, however, that whether the fee is fixed or otherwise, its sum should be determined by mutual agreement of both consultant and consultee prior to consumation of the contract.

CONSULTING FEES MAY BE CONTINGENT ON—

- Professional reputation of the consultant
- Pre-set standards of individual colleges
- Length of time to be spent on assignment
- Amount of preparation needed prior to consultation
- Number of visits to consultative site required
- Formal presentations required (speeches, addresses, etc.)
- Type and size of written report
- Follow-up work, if requested

THE CONSULTATION